

A group of people at a social gathering, possibly a bar or restaurant, holding drinks with lemons and mint. The background is blurred, showing other people and greenery. The text is overlaid on a dark blue circular graphic on the left side of the image.

FRANCE ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, January 2025

SUMMARY

- **Visitation Rate in January:** Compared to last year, in January more consumers went out to eat (+3pp) and drink (+2pp), although they limited the frequency of their outings, preferring monthly outings.
- **Categories Drunk:** Whereas the most popular category in December was hot beverages, in January beer takes first place. Beer is also the category perceived as offering the best value for money, the best quality of service and the most enthusiasm. Cocktails remain a category of experience and innovation in which consumers are exploring novelty in the on-trade.
- **Prognosis for February:** Less consumers are planning to go out over next month, but gen-z are planning to increase the amount they go out.

- **Hot Topic (Holidays):** The on-trade continues to attract consumers during the festive season, but visits are slightly down on the usual levels. Consumers are opting for higher-quality drinks, reducing the number of glasses they drink, but opting for more expensive beverages to indulge during the festive season.
- **Hot Topic (Prognosis for 2025):** Consumer habits appear stable for the coming year. However, some consumers are looking for healthier, higher-quality options, with value for money being the most important factor in Italy and Germany too.
- **Hot Topic (Dry January):** Dry January, a growing trend in Europe, is prompting more and more people to reduce their alcohol consumption. During this period, the number of outings is often reduced, although the range of alcohol-free alternatives is diversifying. This desire for moderation tends to extend beyond the month of January. The main categories remain the traditional mocktails and alcohol-free beers.



Julien Veyron

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“ Our 3 hot topics reflect consumers' growing desire for moderation and quality. To maintain the attractiveness of hospitality establishments and meet French consumers' desire for balance, it is essential to strengthen and broaden the range of alcohol-free alternatives to satisfy a curious clientele in search of new, high-quality experiences. ”



CGA'S MONTHLY CONSUMER PULSE

- This monthly On-Premise Consumer Pulse report is intended to capture consumers consumption patterns and how they fluctuate in the transition period from December 2024 to January 2025 in France.
- This study looks into consumer's On-Premise behaviour over the *past month* and tests visit intention for the *month ahead*.
- In other countries, this monthly check-in has become a staple for beverage suppliers and other businesses interested in the channel.
- These monthly updates will help interested parties to stay close to the consumer's intentions and behaviours for our beloved On Premise channel.
- For this **January 2025** issue, we surveyed 757 consumers (aged 18+) between January 23rd – 28th 2025. These consumers were situated across all French regions and must typically visit On Premise venues at least once within a 3-month period.

Key metrics & On Premise visitation



LOOKING BACK



87%

of consumers have been out to eat in the previous month

+2pp vs January Last Year

49%

of consumers have been out for a drink in the previous month

+1pp vs January Last Year



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 757 – 750

LOOKING BACK



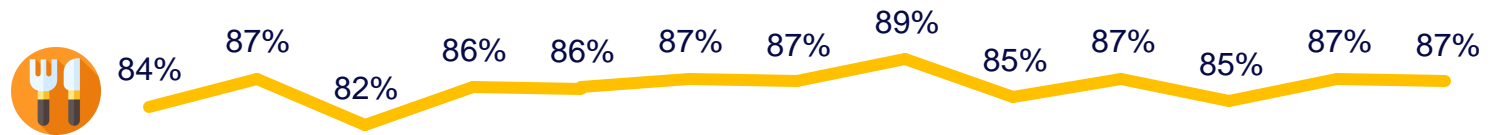
97% of consumers visited the On Trade this month

=0pp vs January last Year



FREQUENCY VISITING THE ON PREMISE OVER THESE LAST MONTHS

Yearly visitation rates to the On-Premise



Jan Feb March April May June July Aug Sept Oct Nov Dec Jan

— Have been out to eat in the last month

— Have been out to drink in the past month

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025— SAMPLE: 750

HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

Frequency visiting On Premise in the past month

■ Everyday / almost everyday
 ■ Weekly
 ■ Monthly



Overall



-1pp vs January Last Year

-3pp vs January Last Year

+4pp vs January Last Year



To Drink



To Eat



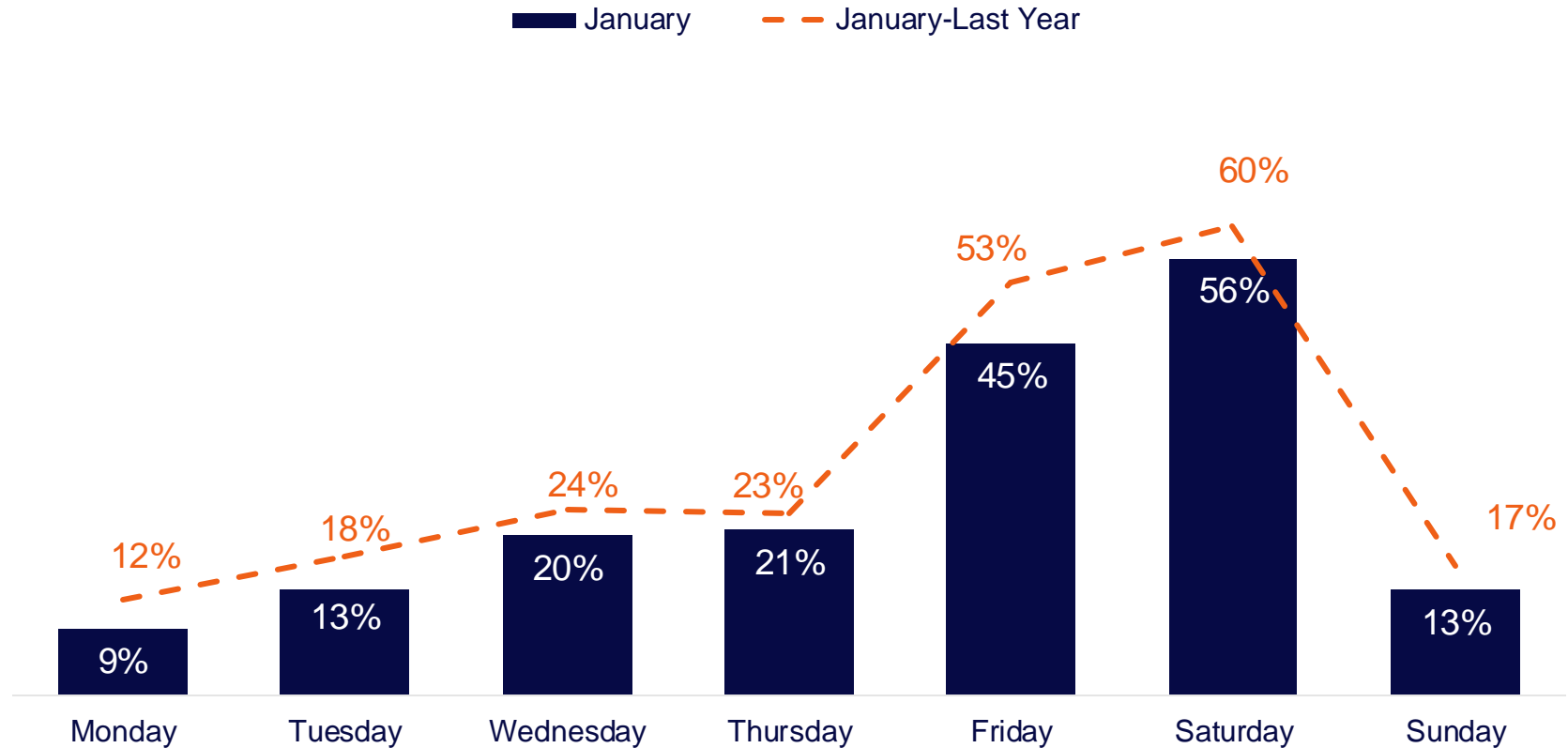
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 728 - 724





ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

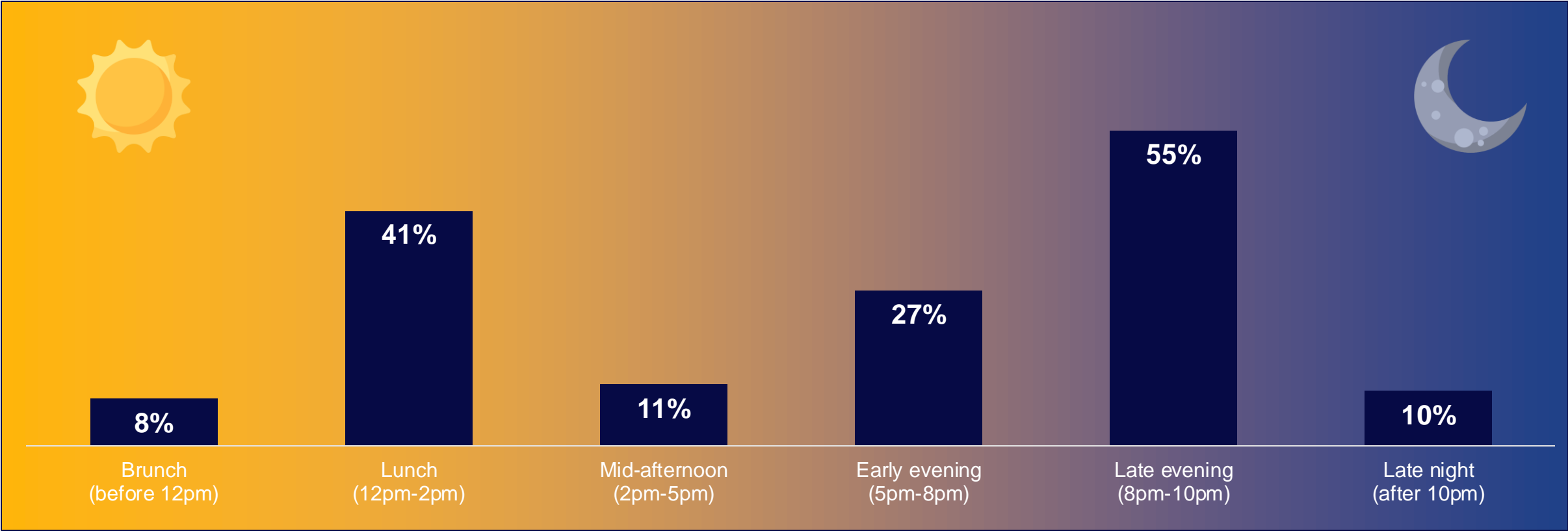
Day of the week visiting the on-premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 728 - 724

WHAT TIMES OF DAY HAVE YOU BEEN VISITING BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

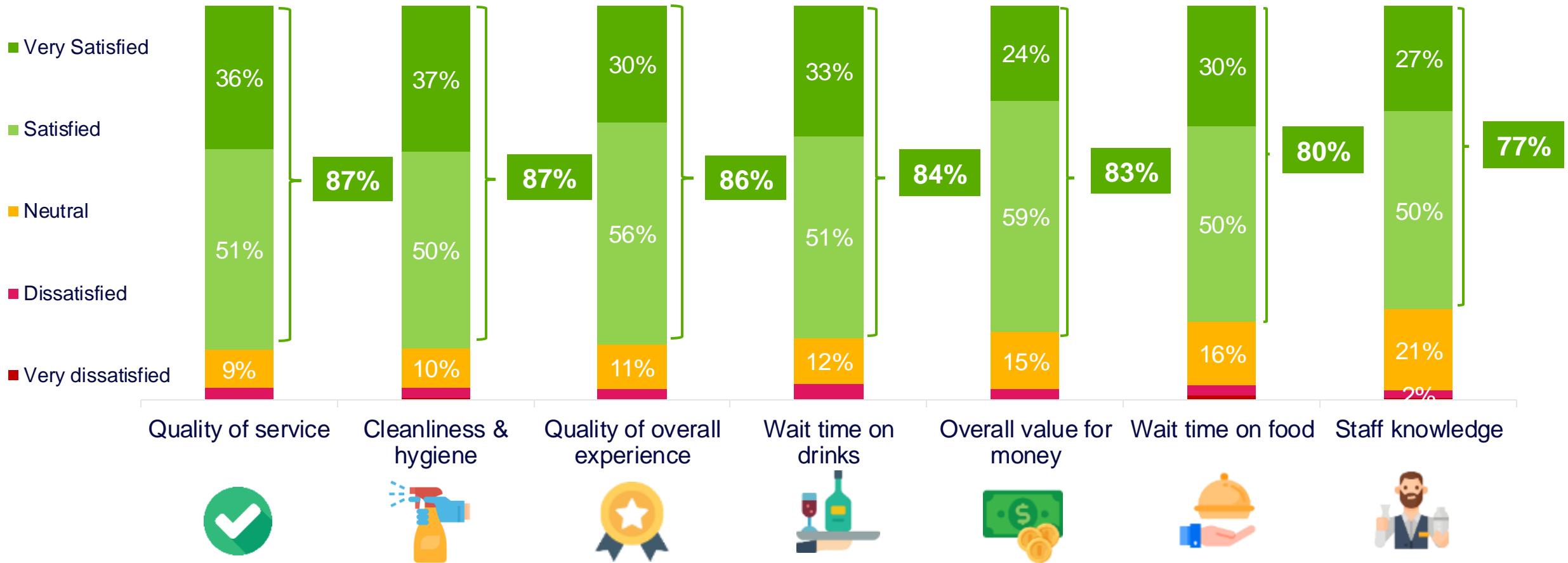
Time of day for visiting the On-Premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 732 - 723

SATISFACTION WITH MOST RECENT VISIT TO THE ON PREMISE

Proportion of consumers very satisfied/satisfied with...



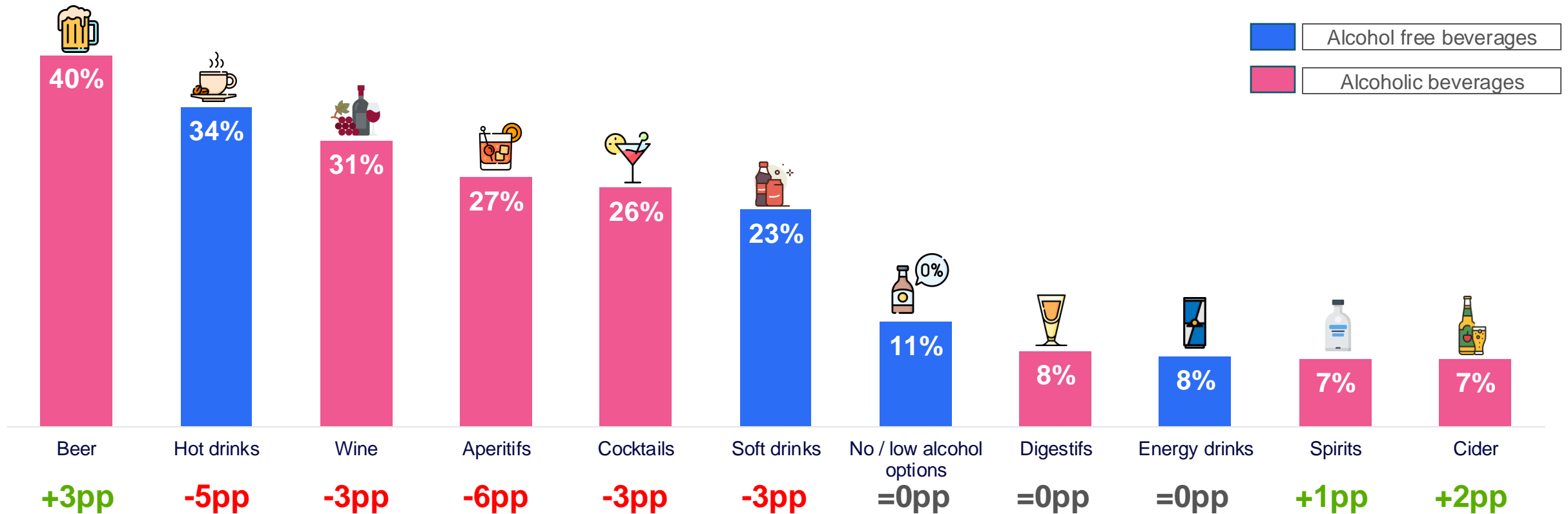
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 362 - 750

Key Metrics: Categories Drunk



WHICH OF THE FOLLOWING DRINKS HAVE YOU DRANK IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

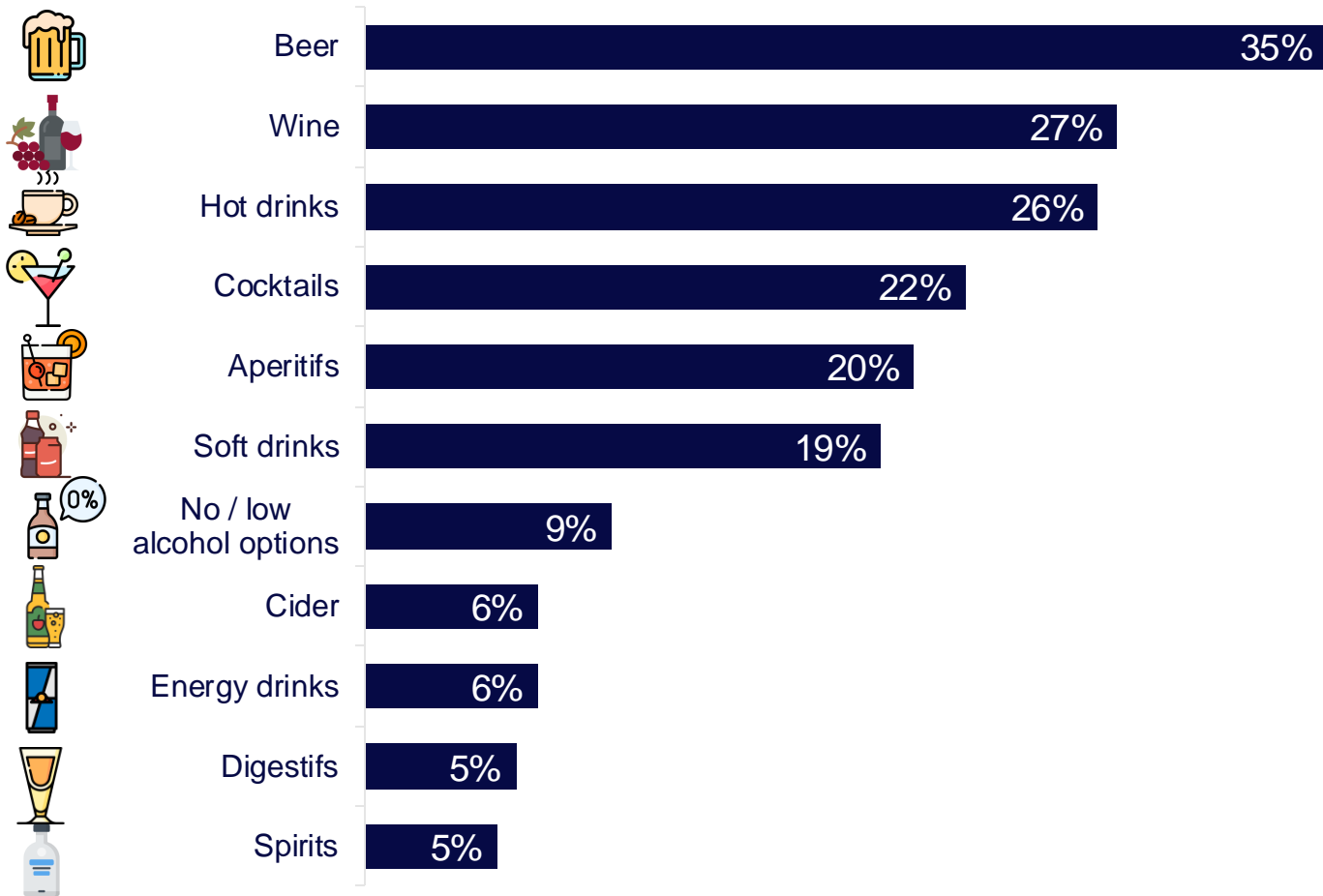
Most popular drink categories | Indexed vs. January last year



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 723 - 733

THINKING ABOUT **YOUR MOST RECENT VISIT TO A BAR, RESTAURANT OR SIMILAR VENUE, WHICH OF THE FOLLOWING CATEGORIES DID YOU DRINK?**

Last drink ordered



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 754

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING **ITS VALUE FOR MONEY?**

Shown to individual drink category consumer on latest visit

% **very satisfied** / **satisfied** with **value for money** 



Beer	Aperitifs	Wine	Hot drinks	No / low alcohol options	Soft drinks	Cocktails
86%	84%	84%	83%	82%	80%	75%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 65 - 259

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING HOW EXCITING IT WAS?

Shown to individual drink category consumer on latest visit

% **very satisfied** / **satisfied** with **how exciting the drink was** 🌟



Beer	Wine	Cocktails	Soft drinks	Hot drinks	No / low alcohol options	Aperitifs
87%	84%	83%	73%	82%	76%	85%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 62 - 258

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS **QUALITY OF SERVE**?

Shown to individual drink category consumer on latest visit

% **very satisfied** / **satisfied** with **The overall quality of the serve**



Beer	Wine	Cocktails	Soft drinks	Hot drinks	No / low alcohol options	Aperitifs
89%	88%	88%	81%	91%	80%	88%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 65 - 259



HAVE YOU TRIED A NEW DRINK WHEN EATING OR DRINKING OUT OVER THE PAST MONTH?

+33pp for Gen-Z consumers

+19pp for consumers from Paris



28%

Yes



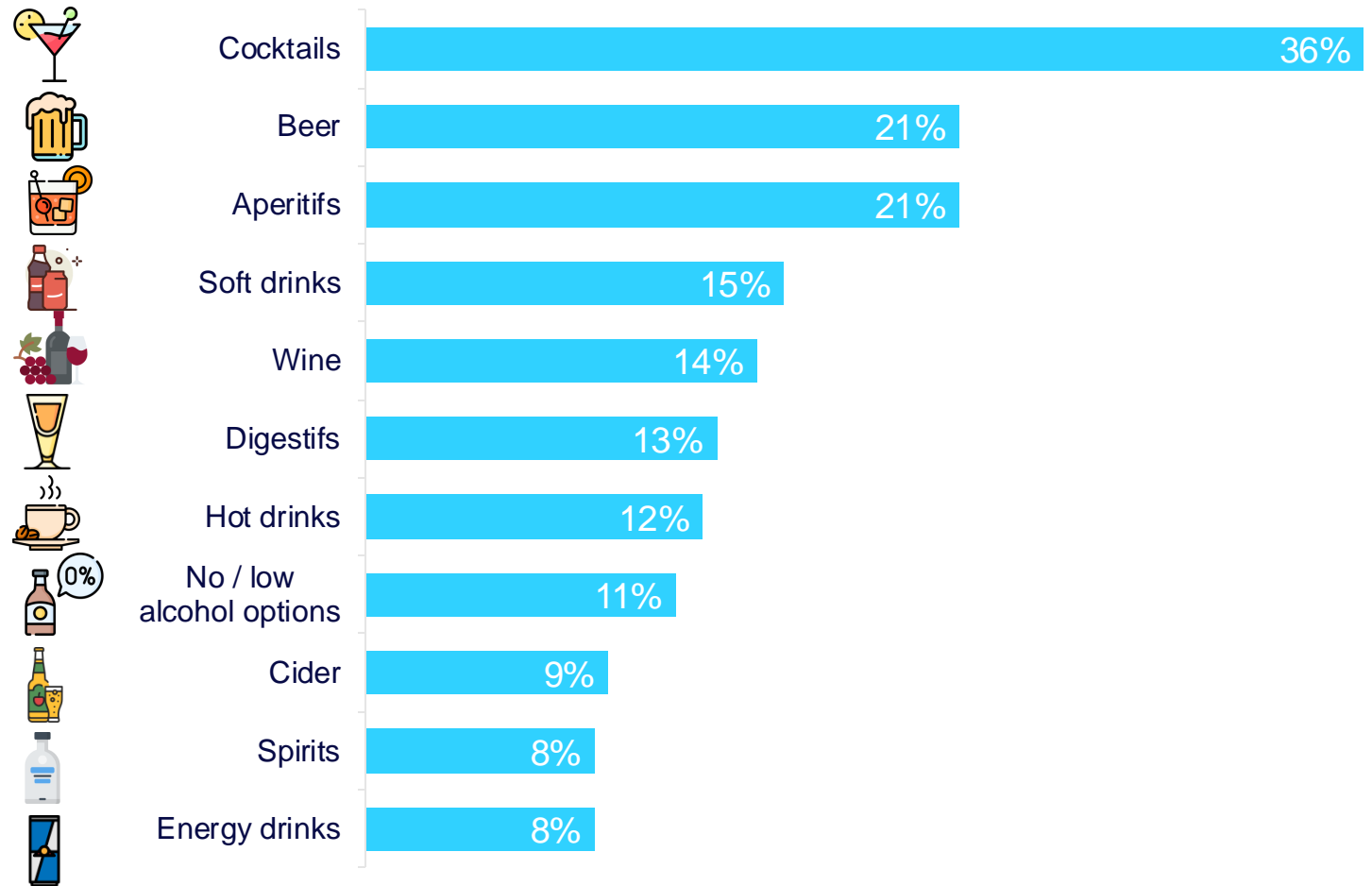
72%

No

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 126 - 754

WHICH OF THE FOLLOWING CATEGORIES WAS THE NEW DRINK THAT YOU TRIED?

New drinks tried by those going out for food and drinks



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 206

Key Metrics: Next Month Prognosis





78%

of consumers plan to go out to eat in the next month

-9pp vs January last year

37%

of consumers plan to go out for a drink in the next month

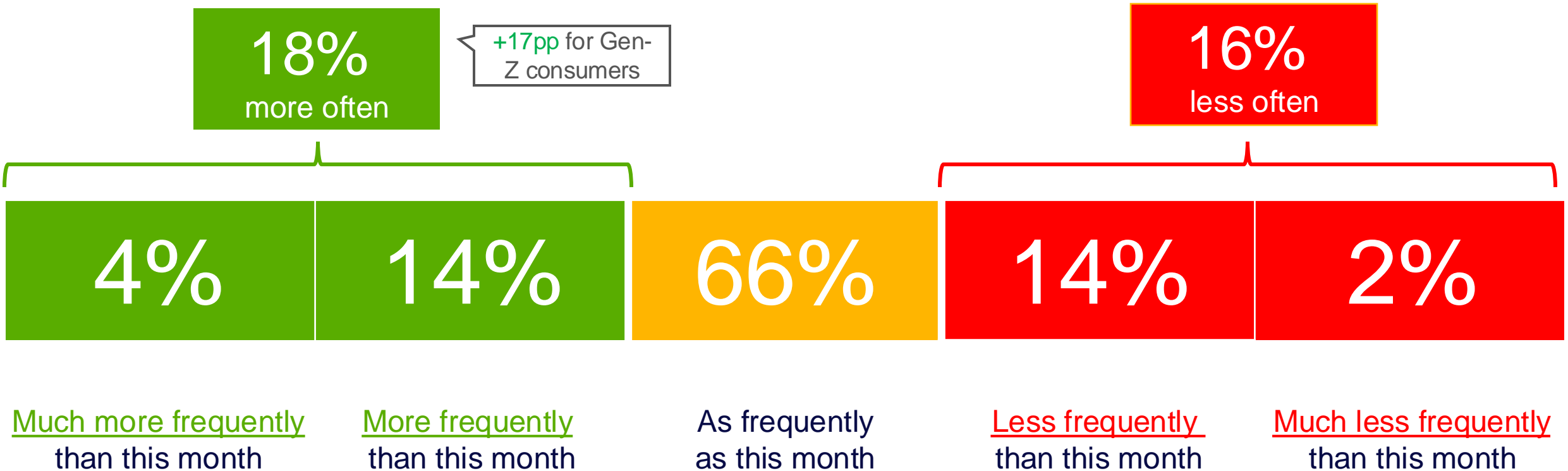
-15pp vs January last year



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 756 - 750

HOW OFTEN DO YOU PLAN TO VISIT BARS, RESTAURANTS OR OTHER SIMILAR VENUES OVER THE NEXT MONTH?

Asked to those planning to visit the On Premise in the next month



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 112 - 687

Hot Topic: Holiday Consumption





COMPARED TO YOUR USUAL BEHAVIOUR THROUGHOUT 2024, HOW OFTEN DID YOU GO OUT TO EAT AND/OR DRINK OVER THE CHRISTMAS PERIOD?



24%

I went out more often during the Christmas period



34%

I went out the same amount during the Christmas period



27%

I went out less often during the Christmas period

15% didn't go out at all during Christmas period

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 754

DID YOU GO OUT TO EAT/ DRINK OVER THE 2024 CHRISTMAS PERIOD, FOR ANY OF THE FOLLOWING OCCASIONS? PLEASE SELECT ALL THAT APPLY

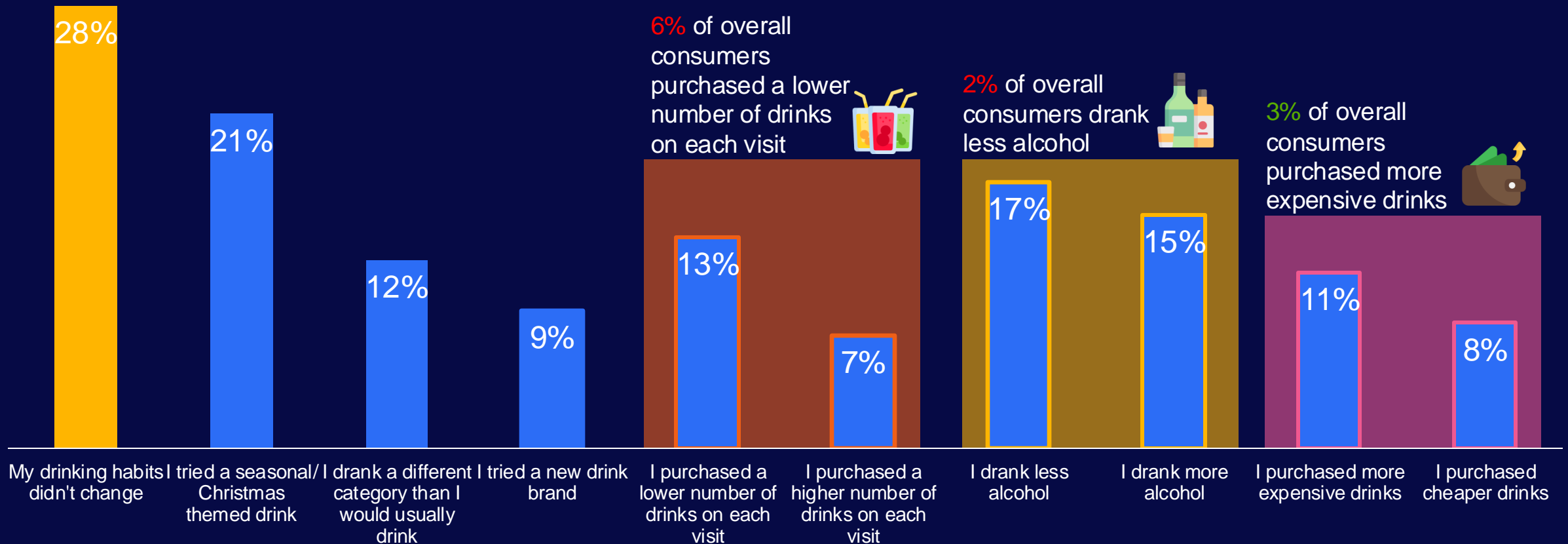
Top 5 most popular occasions for visitation over the Christmas period



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 639

IN WHICH OF THE FOLLOWING WAYS, IF ANY, DID YOUR DRINKING HABITS CHANGE WHEN VISITING EATING AND DRINKING OUT VENUES OVER THE 2024 CHRISTMAS PERIOD? PLEASE SELECT ALL THAT APPLY

Changes in consumers drinking habits during the Christmas period



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 639

Hot Topic: New years Resolutions



NielsenIQ



WHICH OF THE FOLLOWING WILL BE IMPORTANT TO YOU WHEN EATING AND/OR DRINKING OUT IN 2025?

For France 

Good value food/ drink options



62%

Deals and promotions



33%

Local food/ drink options



30%

Better variety of food/ drink options



26%

Entertainment in venues



21%

Health-conscious options



19%

Cheap food/ drink options



18%

Immersive experiences



14%

New and innovative food/ drink options



12%

More sustainable/ eco-friendly options



11%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 754

WHICH OF THE FOLLOWING WILL BE IMPORTANT TO YOU WHEN EATING AND/OR DRINKING OUT IN 2025?

For Italy 

Good value food/ drink options



51%

Deals and promotions



36%

Local food/ drink options



32%

Better variety of food/ drink options



28%

Health-conscious options



24%

Cheap food/ drink options



22%

Entertainment in venues



21%

New and innovative food/ drink options



17%

Immersive experiences



14%

More sustainable/ eco-friendly options



13%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 751

WHICH OF THE FOLLOWING WILL BE IMPORTANT TO YOU WHEN EATING AND/OR DRINKING OUT IN 2025?

For Germany



Good value food/ drink options



59%

Local food/ drink options



37%

Deals and promotions



31%

Cheap food/drinks options



31%

Health-conscious options



26%

Better variety of food/ drink options



23%

More sustainable/ eco-friendly options



15%

Entertainment in venues



15%

New and innovative food/ drink options



15%

Immersive experiences

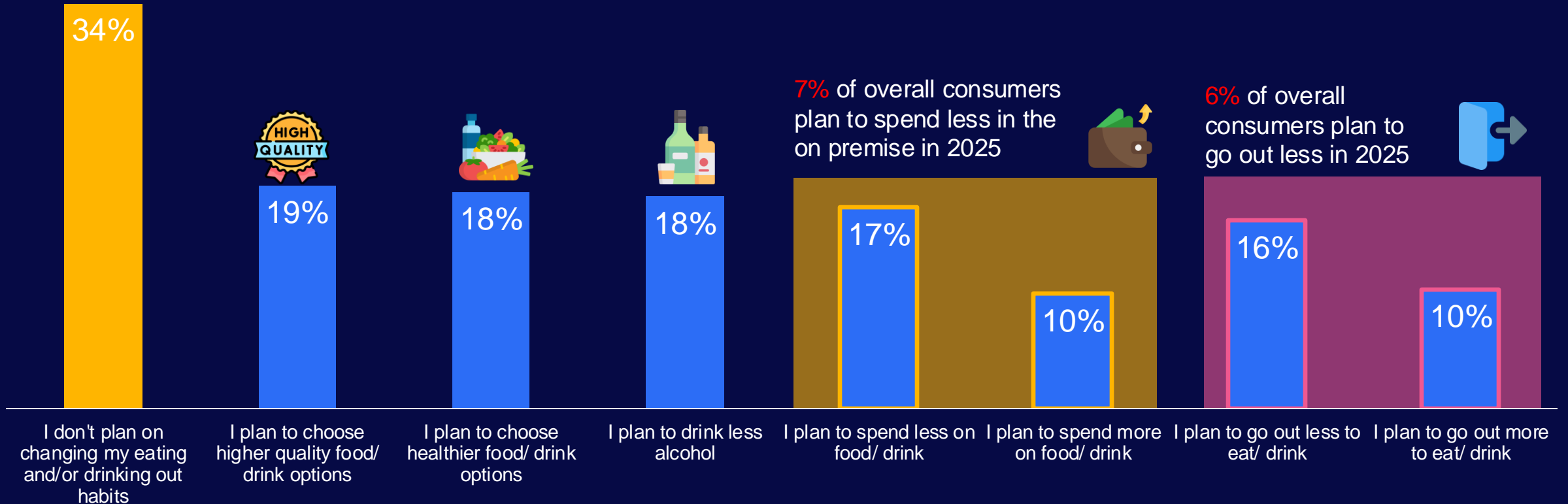


7%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 1008

WHAT ARE YOU PLANNING TO PRIORITISE THIS YEAR WHEN IT COMES TO EATING AND DRINKING OUT IN 2025?

Consumption prognosis for 2025



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 112 - 687



Hot Topic: Dry January



ARE YOU CURRENTLY PARTICIPATING IN DRY JANUARY?

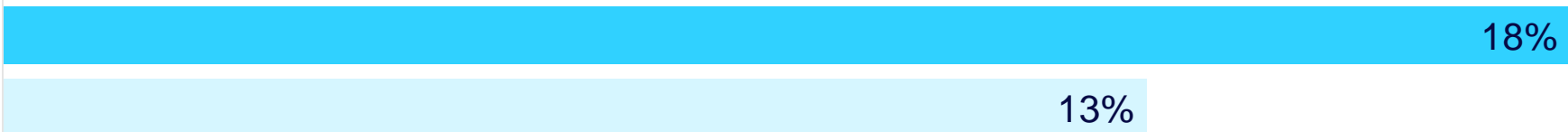
■ Participation rate in 2025 ■ Participation rate in 2024



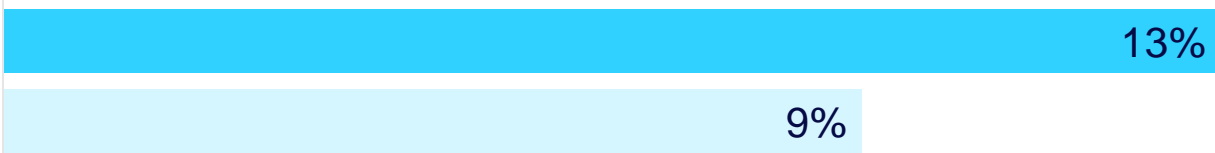
France



Germany



Italy



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 1000 - 750

THROUGHOUT DRY JANUARY, HAVE YOU CHANGED HOW OFTEN YOU VISIT PUBS, BARS, RESTAURANTS OR OTHER SIMILAR VENUES BECAUSE YOU ARE TAKING PART IN DRY JANUARY?



6%

I have visited **more** often than usual



31%

I have visited the same amount as usual

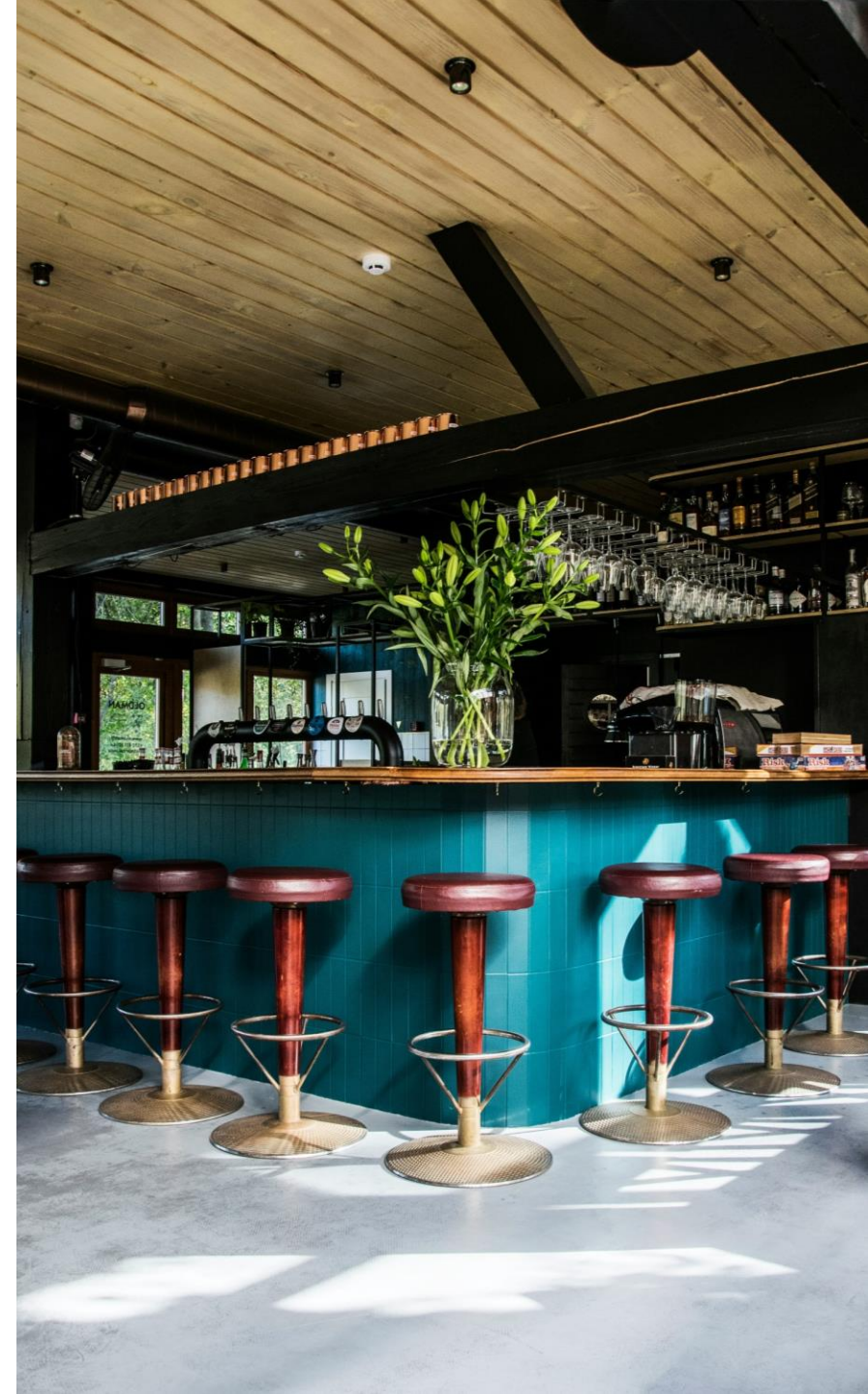


59%

I have visited **less** often than usual

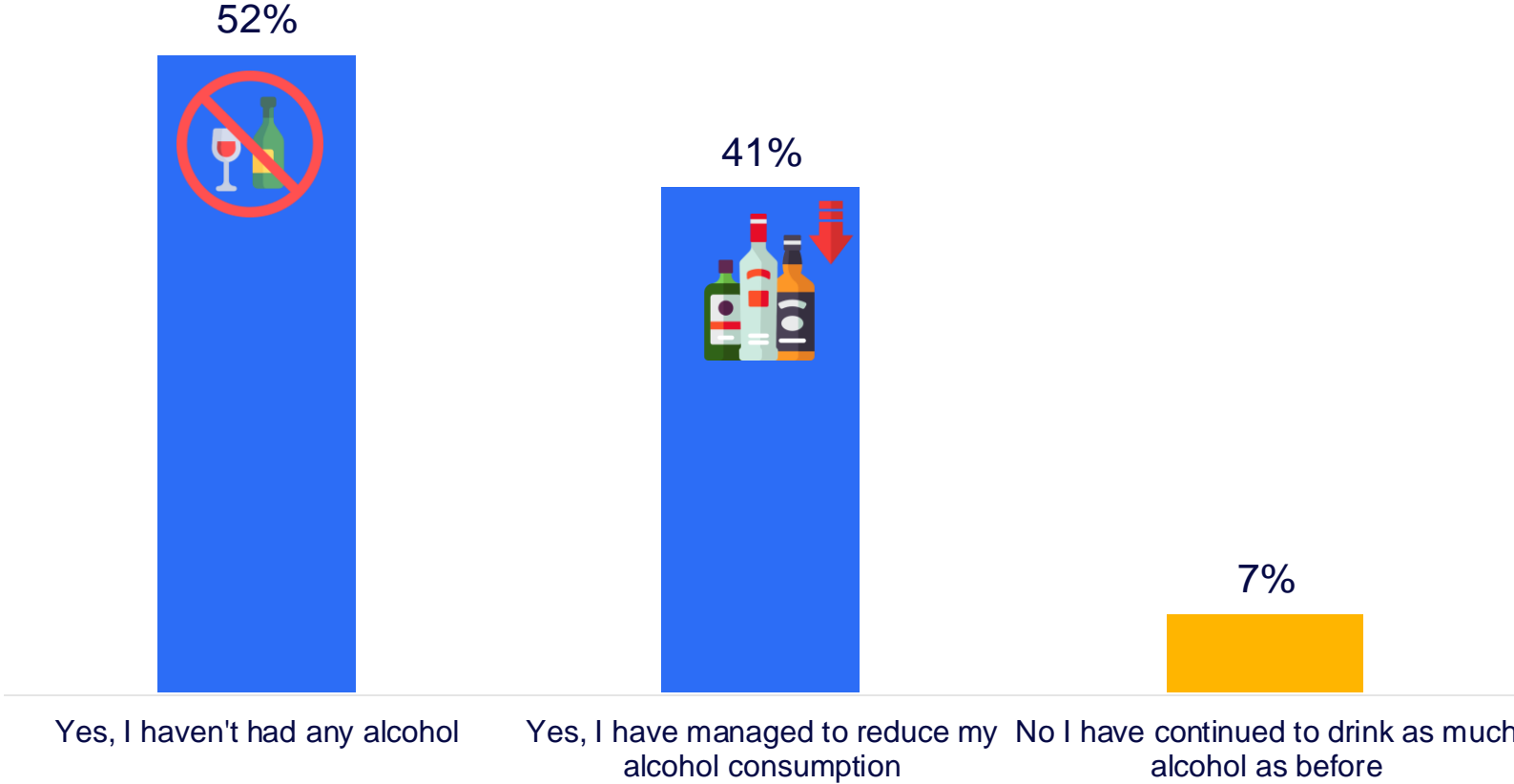
5% didn't visit venues at all during Dry January

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 177





HAVE YOU ABSTAINED FROM ALCOHOL DURING DRY JANUARY AS YOU INTENDED SO FAR?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 177

WHY DID YOU PLAN TO TAKE PART IN DRY JANUARY?



To be healthier

33%



To save money

28%



My social group/
peers are taking part

23%



To decrease my
alcohol intake

21%



There are better non-
alcoholic options
available

20%



My partner is taking
part

15%



Other family
members are taking
part

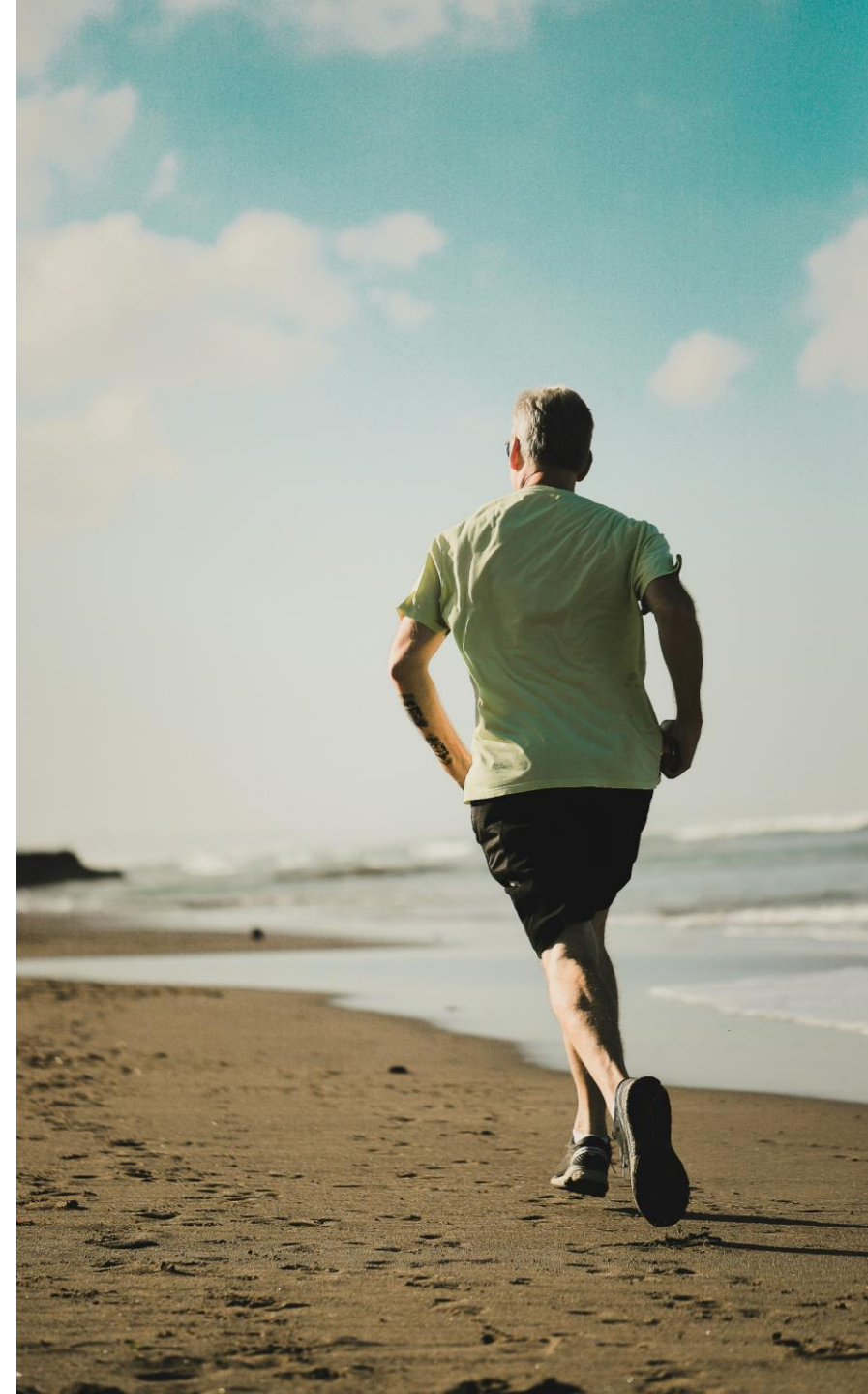
14%



Influenced by social
media

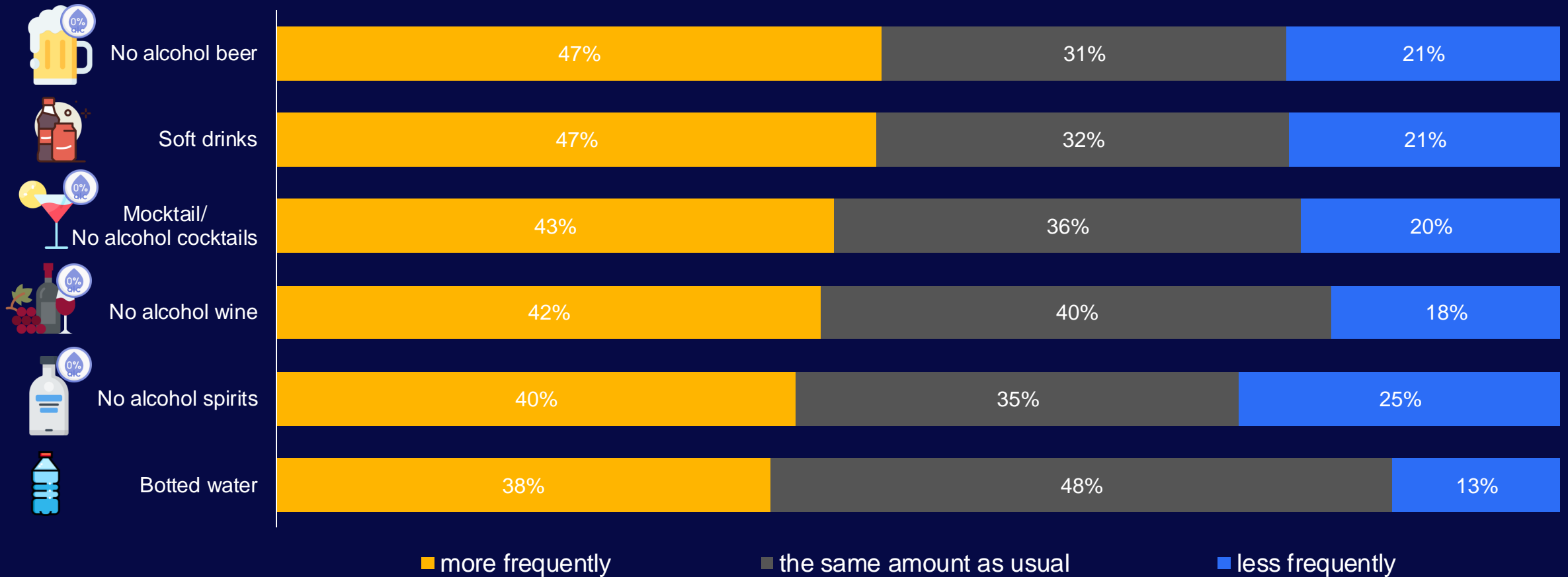
14%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 177



HAVE YOU DRANK ANY OF THE FOLLOWING DURING DRY JANUARY?

I drank this...during dry January



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 177

HAVE YOU DRANK ANY OF THE FOLLOWING DURING DRY JANUARY?

Consumers who drank the following categories for the first time while participating in Dry January



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 177

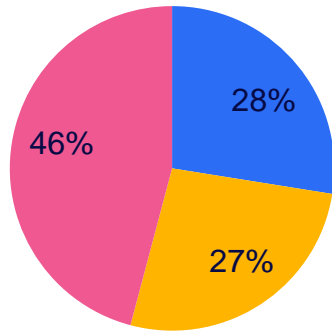
YOU HAVE SAID YOU DRANK THE FOLLOWING DRINKS IN DRY JANUARY. WHERE DID YOU DRINK THESE?

Consumers who drank the following categories while participating in Dry January

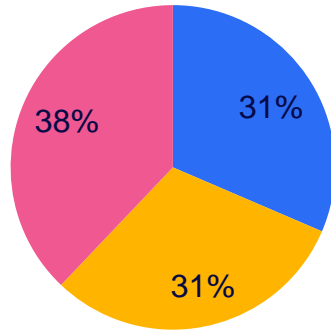
■ At home ■ Both ■ Out at pubs, bars, restaurants etc



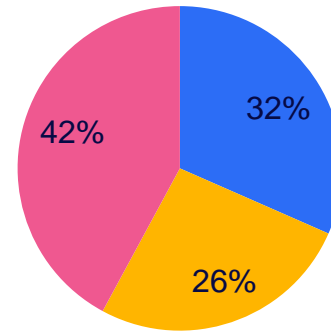
No/low alcohol wine



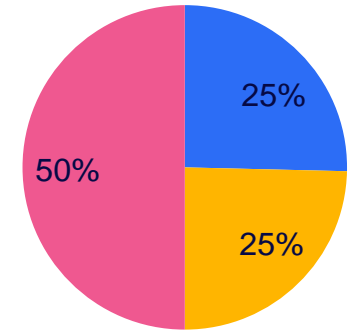
No/low alcohol beer



No/low alcohol spirits



Mocktails



Drunk by...
of consumers

62%

70%

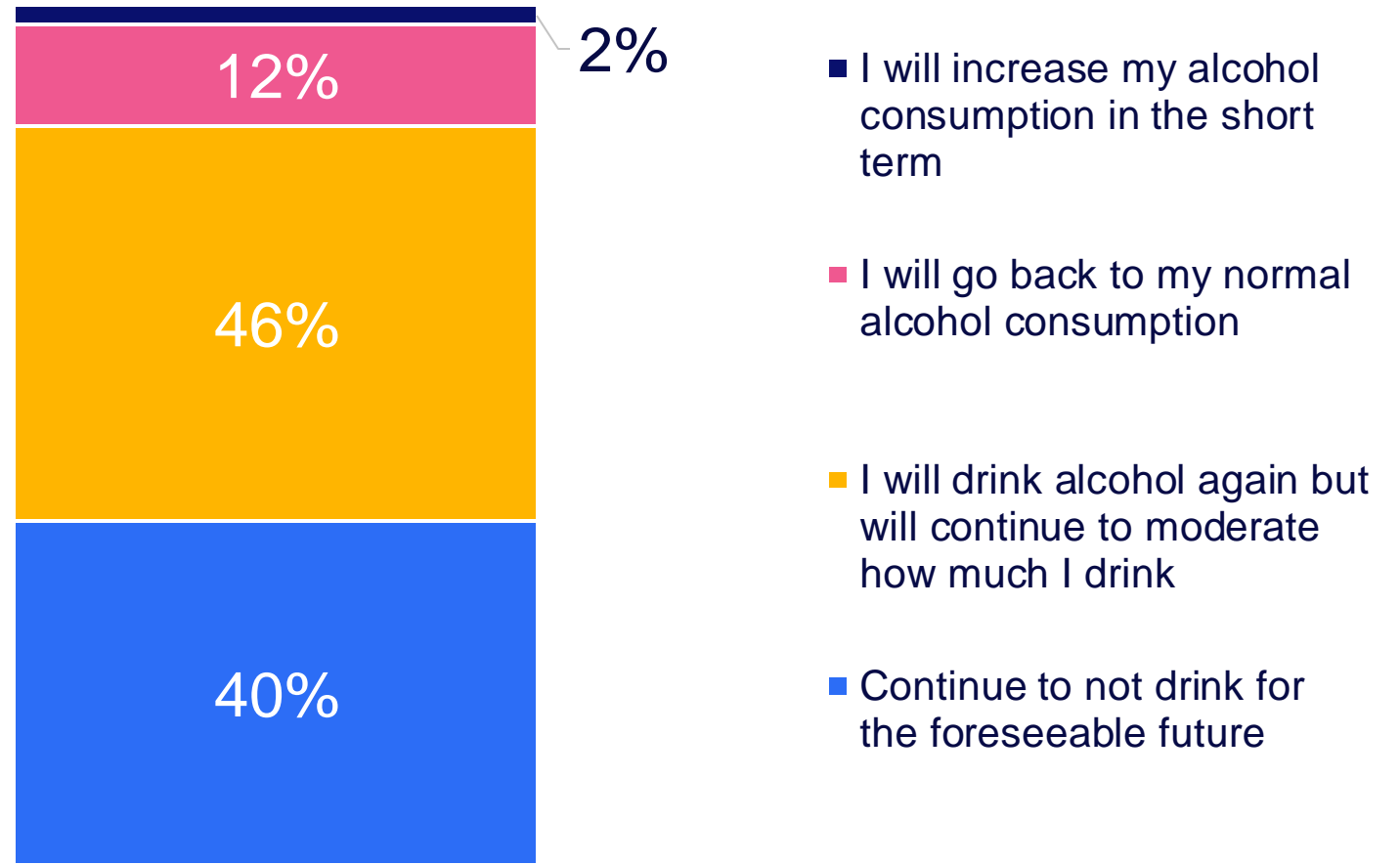
64%

73%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 162-109



WHICH OF THE FOLLOWING DO YOU PLAN ON DOING WHEN DRY JANUARY ENDS?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 162-109

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On Premise news & insights



CGA: Consumer Tools

Additional Consumer Reporting where CGA by NIQ's expertise can be leveraged



Custom RFP Support Decks

Take group-specific sales stories to your national account customers to speak to their consumers and showcase how your portfolio aligns with their strategies



Consumer Segmentation

Strategically and effectively target specific On Premise drinkers to identify offerings and opportunities that relate to them, ensuring \$ are spent more effectively in On Premise brand building



Optimum Assortment

CGA's assortment tool allows you to enable your teams to showcase the optimal range for outlets and highlight where brands should be placed within a range to achieve highest sales and increase customer satisfaction



Custom Research

From online surveys to focus groups and in-outlet intercepts, CGA has access to millions of consumers across the world to answer your most important questions



Path to Purchase

Understand the decision corridor consumers go through when purchasing products, and identify how these choices impact the decisions that result in final sales



Bartender Research

Bartenders and servers are the final touch point of influence in the channel. With such change, understanding advocacy and bartender needs is extremely important in influencing the sales of your products

Find out how build a successful On Premise strategy

For more information on how CGA by NIQ can help your business grow in the French On Premise, get in touch:



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